1. Agent sets appointment

2. Agent emails support staff the date/time & client email address to send intro email with the 5 attachments:

   -Family Data, Asset/Liability, People/Org, 3 Options, and 5 Key Decisions

3. Support staff/Agent creates file folder for Agent's appointment. Put in folder a copy of: *Single/Double Grantor forms, Credit Card Form and Data Authorization Entry Form*

4. Agent meets with client

   If agent enters Trust online (Recommended) with client… You will be prompted to change the password.

   Password – City they live in

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5. After Meeting
   If there is paperwork, bring back to the support staff for entry.

   Once entered, the support staff will call client – Quality Control.

6. Generate & Print Trust

7. Assemble binder with tabs
   Include a copy of Deedwerx

8. Agent sets appointment for Notarizing
   Be familiar with the pages that need to be notarized and initialed

   Client brings witnesses that are not in the documents

   Sign & Notarize

9. Support Staff scans and uploads Trust into vault
   - Include 3 copies of the Certificate of Trust in binder

10. FEDEX or deliver to client

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